UNIT Title: Getting started with SAP — **Designer: Beth W.**

Purpose: Familiarize new users with logging on/off and UI — **Seat-time: 80 mins**

Context:
Honeywell has not had a basic SAP navigation course, even though some users have been on the system for years. New hires and those converting to SAP from the existing ERP system (Kinaxis) need a gentle hand in figuring out how to get into SAP, navigate around to find and execute the transactions (tasks) they need to do their jobs, and log off. Honeywell has asked me to create an instructor-led, in-person (or remote synchronous) course that can be adapted to e-learning in the future.

This SAP is the traditional client-server interface, known in the SAP world as ECC. There is a cloud-based SAP solution also, but Honeywell will not be implementing that for three years yet.

Target Audience:
New hires without SAP experience, current employees who are converting from Kinaxis, and anyone wanting a refresher or who wants to learn new tips and tricks in navigating the SAP interface. Users are assumed to have basic computer skills (keyboard and mouse) but do not need prior SAP experience. Most users have at least a bachelor's degree or equivalent in their home country.

Expected UNIT outcomes:
Given a laptop or desktop computer with SAP loaded on it, learners will be able to:
- Launch SAP from the Logon Pad 100% of the time without help
- Log on every time, using their given credentials, without getting locked out of the system
- Identify at least six major components of the SAP user interface and explain what each component does
- Run a transaction two ways
- Log off SAP properly every time when finished

Overview:
Instructor should give a brief summary of what SAP is, why Honeywell is adopting SAP, and how similar it is to prior programs the learners have used such as Kinaxis. They should explain to the learners that SAP is similar to Outlook in that it is a client-server interface. Each server in SAP stores a different set of data. Users are given access to a server by assigning them a specific role which can execute only certain transactions. They then log on to their assigned client to gain access to that server and its data.

To log on, users need the following info: the server number, their user name (employee number), a password that meets certain criteria, and the language they want to work in. For now, this class will be in US English. MX Spanish will come later for users based in Mexico.

UNIT Title: Getting started with SAP   **Designer: Beth W.**

Purpose: Familiarize new users with logging on/off and UI   **Seat-time: 80 mins**

Key UNIT content: This is the second unit. Instructor will demo how to log on, then distribute credentials in class, and the users log on with those credentials. Instructor explains that their "real" credentials will be given to them about a week before SAP goes live. Users log on, and instructor moves about the class coaching learners where needed. Users arrive at the home screen, called SAP Easy Access, and stop right there. Instructor points out and explains the major parts of the interface (see content hierarchy on next slide) and explains what each part does.

Instructor can point out buttons and icons that are similar in Kinaxis and SAP. For example, Save and Print will always be the same. Other buttons may look or be named different but have similar functions. For example, a bookmarked workbook in Kinaxis is a Favorite transaction in SAP.

Content learning assessments: For this unit, just a quick knowledge check (two or three open-book questions) is needed. A full quiz-type assessment is planned for the end of the full course. Optionally, instructor may ask the users additional questions about the interface and have them answer in the group.

Resources required for UNIT: Instructor guide, user guide, job aids, training computers pre-loaded with SAP, one SAP training system (client) set up by the SAP config team, and a number of user ID's and passwords enabled on that client. NO OTHER users are to be given access to that client.

Instructor needs authorization to go into SAP and reset a learner's password in case they lock themselves out by entering an incorrect password three times. This can be set up by the config team also.

Facilities required for UNIT: Computer training classroom with 15 learner and one instructor workstations; video projector or HDMI TV connection; whiteboard and dry-erase markers; pens and notepads for participants; Post-it Notes and flipchart for parking lot questions. Optional: microphone if the instructor wants it; Zoom or other conferencing access so class may be recorded and viewed asynchronously later if desired.
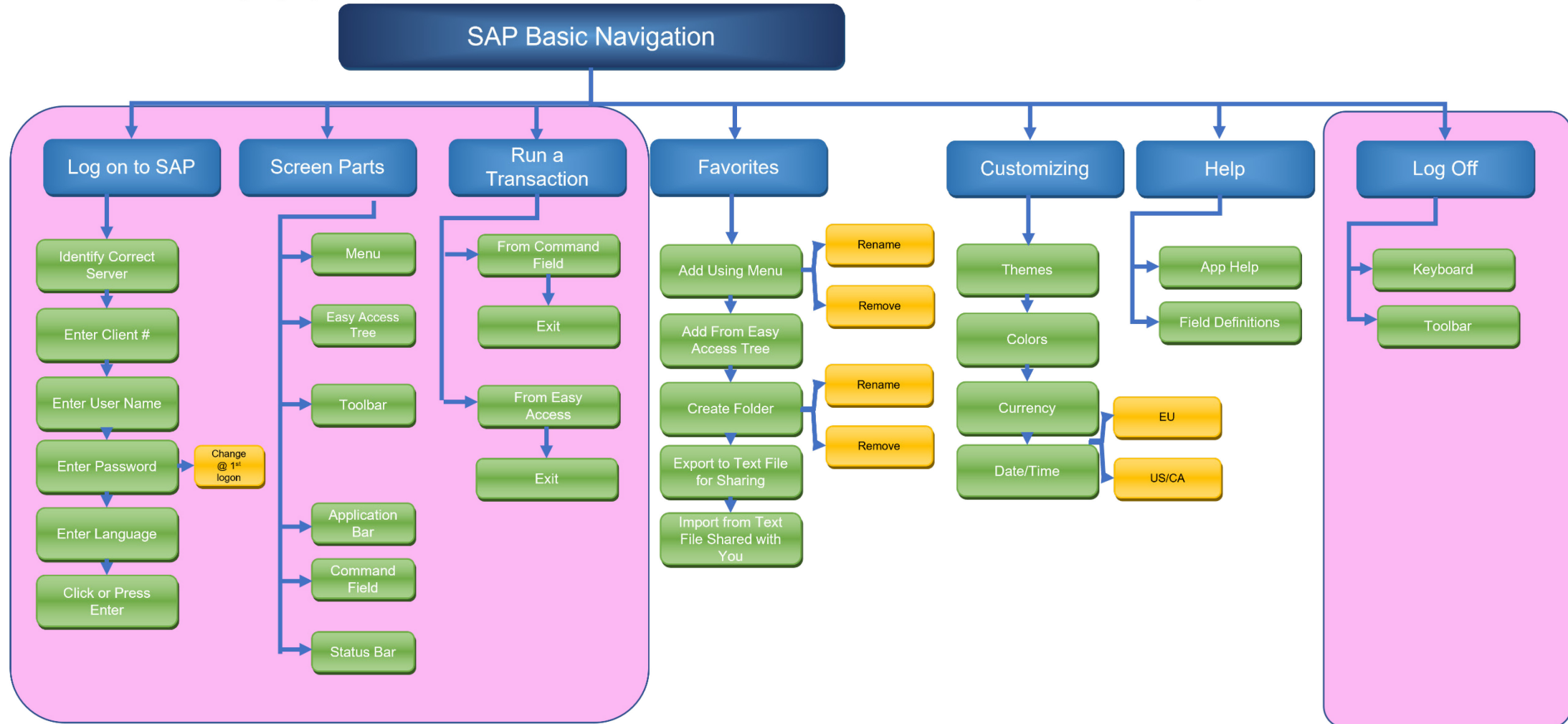
UNIT Title: Getting started with SAP   **Designer: Beth W.**

Purpose: Familiarize new users with logging on/off and UI   **Seat-time: 60 mins**

Content Hierarchy: *Shows overall performance and ALL key knowledge/skills required to be competent …*
highlight parts of hierarchy that will be covered in UNIT. Include at least 3 main branches and 3 levels for each branch.
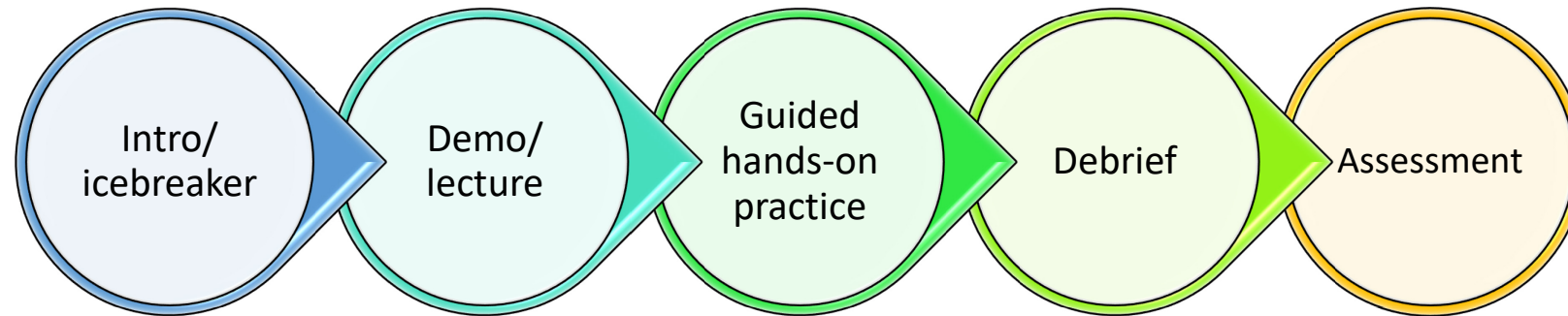
SAP Basic Navigation

Log on to SAP
- Identify Correct Server
- Enter Client #
- Enter User Name
- Enter Password → Change @ 1st logon
- Enter Language
- Click or Press Enter

Screen Parts
- Menu
- Easy Access Tree
- Toolbar
- Application Bar
- Command Field
- Status Bar

Run a Transaction
- From Command Field
- Exit
- From Easy Access
- Exit

Favorites
- Add Using Menu → Rename / Remove
- Add From Easy Access Tree
- Create Folder → Rename / Remove
- Export to Text File for Sharing
- Import from Text File Shared with You

Customizing
- Themes
- Colors
- Currency → EU / US/CA
- Date/Time

Help
- App Help
- Field Definitions

Log Off
- Keyboard
- Toolbar

UNIT Title: Getting started with SAP   **Designer: Beth W.**

Purpose: Familiarize new users with logging on/off and UI   **Seat-time: 80 mins**

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Intro/icebreaker  →  Demo/lecture  →  Guided hands-on practice  →  Debrief  →  Assessment
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Brief EVENT descriptions:

1. Introductions and Icebreaker

2. Access the Logon Pad from the desktop

3. Log on using four fields (mnemonic: CUPL)

4. Identify major components of the main screen and why we use them

5. Run a simple transaction from the Command field

6. Exit the transaction

7. Run the same transaction from the SAP Easy Access tree and then exit

8. Log off SAP properly

9. Discuss what we just saw and how we might use the screen features (reflection)

10. Quick assessment or knowledge check

UNIT title: Getting started with SAP
EVENT Title: Intro   **Estimated Time for EVENT: 10 mins**

EVENT – Introduce the Topic

EVENT Description: The facilitator welcomes the participants and tells them this is the introductory course in SAP. Tell them it is a prerequisite for all other SAP training classes. Tell them no prior SAP experience is needed (if you have it, great), but basic Windows (or Mac) proficiency is assumed.

EVENT Deliverables: Messaging on what is to be covered in this unit and in subsequent units in the course

EVENT-required resources: Facilitator guide, participant guide, computer attached to projector or TV for facilitator, notepads and pens for participants, flipchart, whiteboard, markers

Clarifying Notes on EVENT:

Facilitator introduces him/herself and affiliation with Honeywell. Cites prior experience with SAP in order to establish credibility. Have participants introduce themselves and say what they hope to learn in the class. If time permits, a brief icebreaker may be conducted.

Point out that when they first came to Honeywell, they had to learn how to use Kinaxis (the old system). They weren't born knowing it! Just as they had to learn Kinaxis, and it took practice but eventually they got it, so too will they learn how to use SAP and with practice will eventually get it. Be upbeat and encouraging about them being able to master the basics of SAP. They all have the capability to do it!

EVENT primary and sub-learning objectives:

- Explain what will be covered in subsequent events in this unit
- Explain why these skills will help participants in future SAP courses and future use of SAP

EVENT primary content points: It's just an intro. No need to get down in the weeds with detail just yet. Facilitator should feel free to defer or park (on the flipchart) detailed questions for later discussion or tabling to a future class.

UNIT title: Getting started with SAP
EVENT Title: Access the Logon Pad and Launch SAP   **Estimated Time for EVENT: 5 mins**

EVENT – Access the SAP Logon Pad
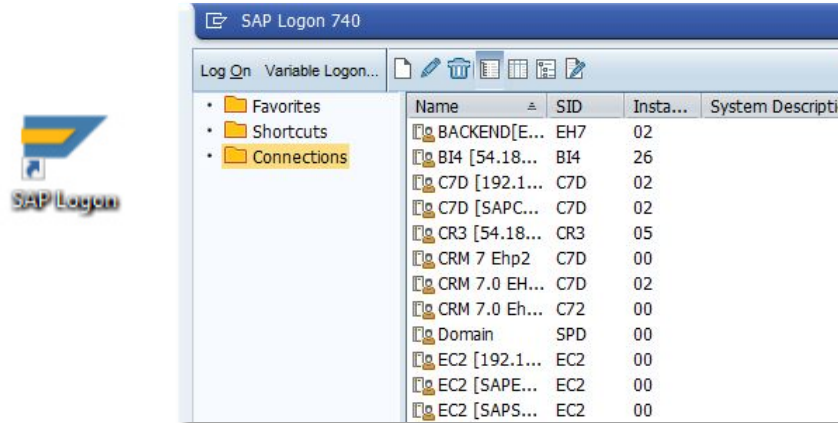
EVENT Description: Facilitator tells participants to find and launch SAP Logon from their Start menu, or by double-clicking the desktop shortcut if one exists. The SAP Logon Pad window displays, similar to that shown at left. Facilitator tells participants to double-click the system to be used in this class, for example EC2. The SAP GUI should launch as shown in the next storyboard.

EVENT Deliverables: Capability to find and launch SAP Logon; display of the logon pad with at least one system listed; display of the SAP GUI by double-clicking the correct system

EVENT-required resources: Facilitator guide, participant guide, computer attached to projector or TV for facilitator, computer workstations for participants, notepads and pens for participants, flipchart, whiteboard, markers

Clarifying Notes on EVENT:
Facilitator invites participants to launch the logon pad by clicking Start --> SAP Front End --> SAP Logon 740. Or, if the shortcut is on the desktop, they can double-click that. Either way, the logon pad displays with all the systems listed. Facilitator explains the data they are looking at on the right: the name of the system, the short ID of that system (always 3 characters), which instance it is, and any verbal description. Facilitator tells participants to double-click the system they'll be using in this training class.
Facilitator should be prepared to troubleshoot in case the systems are not listed. Usually it's just a matter of selecting Connections rather than Favorites or Shortcuts on the left. In extreme cases, there may be no connections, in which case facilitator should be prepared to enter the parameters for the training system so the participant can use it. Preparation of the logon pads prior to class is covered in the facilitator guide.

EVENT primary and sub-learning objectives:
- **Find and launch SAP Logon**
- **Display the SAP Logon Pad**
- **Identify key information listed on the logon pad**
- **Select and launch the correct system to be used for the class**

EVENT primary content points: The SAP landscape of an organization often includes many systems, each with its own data. For training, we will use one system set up just for us in this class. When you go back to your job, you will use a different system with its own name and SID. You will be informed of your credentials in that system about a week before SAP goes live.
You do not need to explain all the other systems listed. Just be aware they are there for other business areas, and if you launch one by mistake you can always just close the window to go back out.

UNIT title: Getting started with SAP
EVENT Title: Enter Logon Info

Estimated Time for EVENT: 10 mins

EVENT – Log on to SAP GUI

EVENT Description: Facilitator explains that this is the intro screen where participants will always log on to SAP. The four fields they need to complete are Client, User, Password, and Logon Language (usually EN but not always). Facilitator tells participants which client to enter, which user name (their own or one created specifically for training), an initial password which must be changed at first logon, and EN for US English (leave it on EN for now).

EVENT Deliverables: Successful logon, display of the SAP Easy Access screen as shown on the next storyboard.

EVENT-required resources: Facilitator guide, participant guide, computer attached to projector or TV for facilitator, computer workstations for participants, notepads and pens for participants, flipchart, whiteboard, markers

Clarifying Notes on EVENT:
Facilitator should clarify that we are using a training system for right now, and the "real live" (production) system will have different info to enter. In production, User will be their employee ID (H number) and the initial password will be something like Welcome1#, which they must change the first time they log on. Facilitator can give password requirements if desired, but they will be given again by email when the user receives their production credentials.
There's a quick mnemonic to use to remember what needs to be entered correctly: C-U-P-L for Client-User-Password-Language. Just a "cupl" of things to know!
Facilitator should be prepared to reset a user password if they lock themselves out of the system. SAP Security should have set up the facilitator with the authorization to do this during class.

EVENT primary and sub-learning objectives:
- List the four pieces of info needed to log on to SAP
- Enter those pieces in the correct fields and press Enter to log on

EVENT primary content points: Besides your username and password, the client you enter is very important. Any info you enter in one client isn't available in other clients, so it's critical to be working in the right client for your business role.
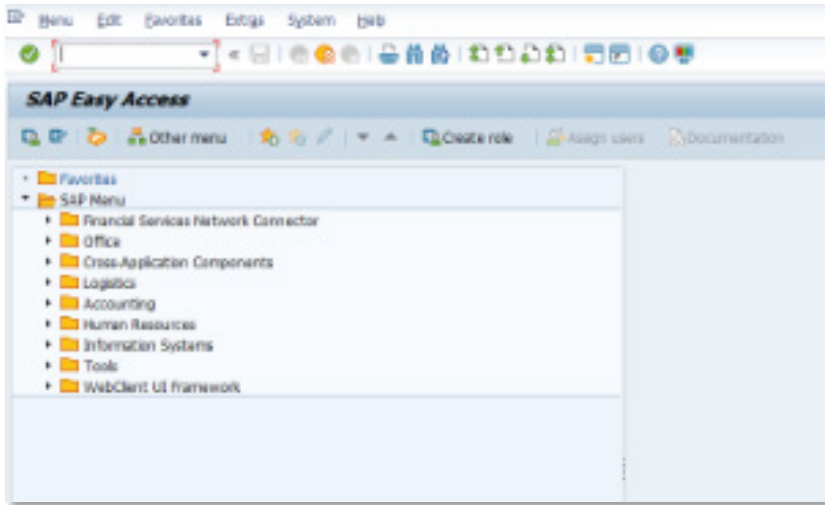If the logon info is entered incorrectly three times in a row, the user is locked out of the system.
Fields marked with a red asterisk are required fields. This is true for all screens and events in SAP.

UNIT title: Getting started with SAP
EVENT Title: Identify Main Screen Components   **Estimated Time for EVENT: 10 mins**

EVENT – Identify Main Screen Components

EVENT Description: **Facilitator explains that this is the first screen users will see when they log on successfully. The title of any SAP screen is the black italic title at the top, in this case SAP Easy Access. Facilitator tells participants to just rest there for a moment and observe as the facilitator points out the key screen components:**

- **Menu Bar**
- **Command Field**
- **Standard Toolbar**
- **Application Bar (which is different from the Standard Toolbar)**
- **Easy Access folder tree**
- **Status bar (not seen in snippet at left, in the lower left corner of the screen)**

EVENT Deliverables: **User able to identify and explain location and function of six key components of the SAP main screen**

EVENT-required resources: **Facilitator guide, participant guide, computer attached to projector or TV for facilitator, computer workstations for participants, notepads and pens for participants, flipchart, whiteboard, markers**

Clarifying Notes on EVENT:
Facilitator should explain the function of the menu bar, Command field, toolbar, application bar, Easy Access tree (sometimes referred to as a menu, but it's not really a menu per se), and the status bar, which is a pop-up in the lower right of the screen. Invite participants to just sit back and relax while you show each part. Point out the menu commands in each group and any keyboard shortcuts listed. Users coming from Kinaxis are used to keyboard shortcuts, so showing them the SAP keystrokes will give a certain comfort level to those users.
On some screens, the Command field and/or status bar may be hidden. Facilitator should point out that each of those components can be expanded or collapsed (hidden) if desired using the arrow button to the right of each component.
Show the different info that can be displayed on the status bar—system, transaction code, flushes, round-trip time, etc. Have participants reflect on which of these options will be most useful to them when they are in the live system. Most end users go for the transaction code, but a few like to display the system they are working in.

EVENT primary and sub-learning objectives:
- **List at least six key parts of the SAP screen**
- **Point out where these parts are on the screen**
- **Explain the function of these six parts**

EVENT primary content points: **The menu bar contains all needed commands for a given transaction. The menu bar will change, depending on what transaction you are running. So will the application bar (below the screen title). This makes sense, since not every command applies to every transaction.**
The Command field is used to run a transaction, open a new SAP window (you can have up to six open at one time), or return to the main screen.
The toolbar has standard universal commands applicable to all of SAP. Some of these buttons have icons you know and recognize, like Save, Print, Find, and Help. Others, like Options and New Session, are unique to SAP.
The Easy Access tree is simply a bunch of folders arranged hierarchically by business area. Some users like to drill down into these folders to run a transaction, rather than using the Command field.

UNIT title: Getting started with SAP

EVENT Title: Run a Transaction from the Command Field   **Estimated Time for EVENT: 5 mins**
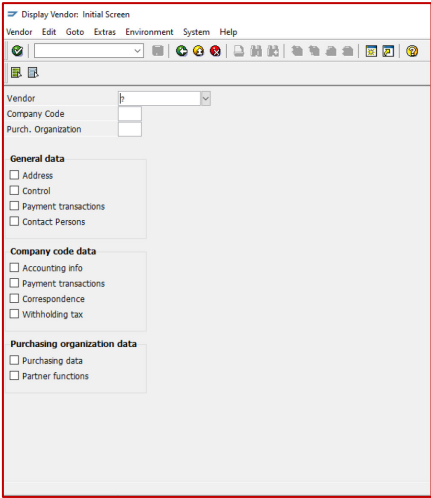
|	
EVENT – Run a Transaction from the Command Field	**EVENT Description:** Facilitator demonstrates how to run a transaction by entering the code in the Command field and pressing Enter or clicking the Enter button on the toolbar (the green ball with the checkmark). Participants then attempt the same.
	EVENT Deliverables: User able to enter a transaction code and display the first screen of the transaction entered
	EVENT-required resources: Facilitator guide, participant guide, computer attached to projector or TV for facilitator, computer workstations for participants, notepads and pens for participants, flipchart, whiteboard, markers

Clarifying Notes on EVENT: Facilitator should choose a transaction that everyone in the class will be able to use in the future. If all participants are from the same job role, for example buyer, use a t-code they all will likely be using, such as from Procurement. XD03, shown above, is a good one to use. Avoid showing them complicated or custom-designed transactions that they will not likely be using; this may be discouraging to new users.

Point out that there is a kind of protocol for the codes. This makes some of them easier to memorize. You can share, for example, that codes starting with an F are Finance, M are Materials (parts), Q are Quality, and S are Systemwide. Those are easy to remember. Some others, like V for Sales and L for Warehouse, don't make sense in English because they are derived from German. SAP is a German company. This is optional information which you can omit for now if you think it's too much for this audience. The learners will encounter it again in their other training classes.

EVENT primary and sub-learning objectives:
- Enter a transaction code
- Display the first screen of the entered transaction.

EVENT primary content points: EVERYTHING you do in SAP has a transaction code ("t-code"). You can enter the code in the Command field and press Enter to run the transaction. Do not worry about which t-codes you need to know just yet. You will be told the codes you need in the relevant training classes. Do not worry about memorizing the t-codes. No one knows them all. Using the t-codes on a regular basis will help you learn them, and you will memorize them naturally. Practice makes perfect!

UNIT title: Getting started with SAP

EVENT Title: Exit a Transaction

Estimated Time for EVENT: 5 mins

EVENT – Exit a Transaction
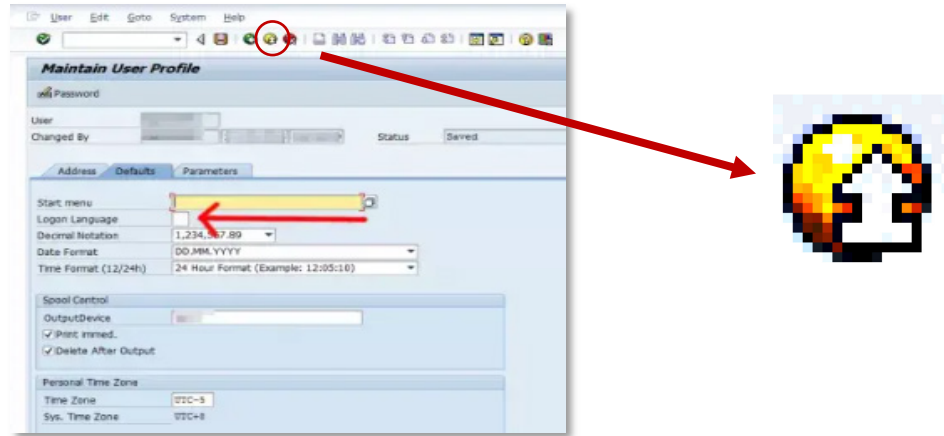
EVENT Description: Facilitator demonstrates how to exit a transaction by clicking the Exit button (yellow ball with the Up arrow). Participants then try it on their own. Facilitator can also demonstrate using a keyboard shortcut, Shift F3, if desired.

EVENT Deliverables: User able to exit a transaction and return to the main screen

EVENT-required resources: Facilitator guide, participant guide, computer attached to projector or TV for facilitator, computer workstations for participants, notepads and pens for participants, flipchart, whiteboard, markers

Clarifying Notes on EVENT: Make an effort to show both the button and the keyboard method for exiting a transaction. Mention that sometimes if the user exits a transaction without saving, the system may prompt them to save their work.
Point out that there is also a Back button (green ball to the left of the yellow ball). They don't always do the same thing. Point out that Back takes them to the last screen, similar to the Back button on a web browser. That's not always the same as Exit.
Participants will likely ask about the red ball button in that group. It's okay to tell them that that is the Cancel button, and usually (not always) does the same thing as Exit.

**EVENT primary and sub-learning objectives:**
- Exit a transaction without saving your work

EVENT primary content points: To exit, click the yellow ball button or press Shift F3. If you were working on something, SAP will ask you if you want to save your work. Not all transactions will do that.

UNIT title: Getting started with SAP

EVENT Title: Run a Transaction from the Easy Access Tree and Exit   Estimated Time for EVENT: 10 mins

EVENT – Run a Transaction from the Easy Access Tree and Exit
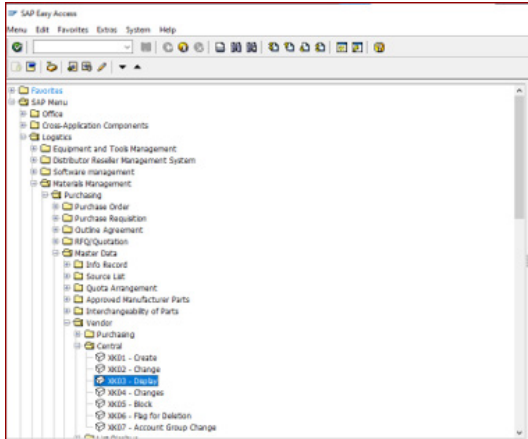
EVENT Description: Facilitator demonstrates how to run a transaction by opening successive folders in the SAP Easy Access tree by double-clicking and eventually arriving at the desired transaction. Participants then try it on their own. Once they arrive at the transaction and observe the initial screen, they should exit the transaction using the method they learned on storyboard 6.

EVENT Deliverables: User able to drill down to a transaction within the Easy Access tree and immediately exit without saving anything

EVENT-required resources: Facilitator guide, participant guide, computer attached to projector or TV for facilitator, computer workstations for participants, notepads and pens for participants, flipchart, whiteboard, markers

Clarifying Notes on EVENT: Point out that this is an alternative way of accessing a transaction. Either this method or the method on storyboard 5 is acceptable. Facilitator should choose a transaction that is relevant for the majority of the class. If the class is a mix, XK03 (Display Vendor) or XD03 (Display Customer) are good bets, as everyone knows what vendors and customers are. Point out how we will know when we have arrived at our transaction when we see the cube icon to the left of the transaction code. Allow the learners to enter the transaction, and then exit it without your help after viewing the screen (scaffolding).

EVENT primary and sub-learning objectives:
*   Access and run a transaction by drilling down into the Easy Access tree
*   Exit the transaction without saving your work

EVENT primary content points: The Easy Access tree contains all standard SAP transactions. It does not contain transactions that were custom-programmed for Honeywell. Those must be accessed using the Command field.

In your subsequent training classes, the instructor will tell you what the path is for each transaction you need to do your job. The paths are also written in the step-by-step work instructions for each transaction.

UNIT title: Getting started with SAP
EVENT Title: Logoff   **Estimated Time for EVENT: 5 mins**

EVENT – Logoff
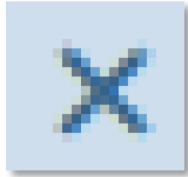
EVENT Description: Facilitator demonstrates how to exit SAP properly and shut down the session by clicking the Close button on the window. Alternatively, facilitator can click the Exit button until completely logged off.

EVENT Deliverables: User able to close down SAP without leaving a session running or without saving work.

EVENT-required resources: Facilitator guide, participant guide, computer attached to projector or TV for facilitator, computer workstations for participants, notepads and pens for participants, flipchart, whiteboard, markers

Clarifying Notes on EVENT: Point out that it is critical that users exit SAP properly at the end of their work, and not leave the session hanging. This is for system stress reasons as well as use license reasons. Explain that the system will always ask the user if they are sure they want to exit (unsaved work will be lost). Explain that users are kicked off the system after a set period of inactivity.
Point out that it is okay to leave the Logon Pad up and running.

EVENT primary and sub-learning objectives:
• Log off the system without leaving any work unfinished

EVENT primary content points: When you're done for the day, always log off SAP by closing the window or clicking Exit until you leave the system. You can also use the keystroke for Exit, Shift F3, until you're completely out. You will return to the Logon Pad. The Logon Pad does not need to be shut down; you can leave it up as long as the computer is running.

UNIT title: Getting started with SAP
EVENT Title: Discussion and Next Steps   **Estimated Time for EVENT: 10 mins**

EVENT – Discussion and Next Steps

EVENT Description: Facilitator asks if participants have questions, which of course they will; facilitator answers questions and performs additional demos as needed. Facilitator explains there will be a short mini-assessment next, after which they will go to the next unit in the course.

EVENT Deliverables: Participants with questions settled in their mind as to how to log on, navigate, and log off SAP.

EVENT-required resources: Facilitator guide, participant guide, computer attached to projector or TV for facilitator, computer workstations for participants, notepads and pens for participants, flipchart, whiteboard, markers

Clarifying Notes on EVENT: Be prepared to answer questions about what comes next. "What do I do when…?" questions are common at this stage. Explain that if their question isn't addressed in future units in this course, it will likely be in one of their content courses.
Clarify that the assessment isn't "pass or else," but just a quick knowledge check to see what they've retained and what they might need to go back and practice or review.

EVENT primary and sub-learning objectives:
- Name the topics coming up in the rest of the course
- Explain how you will use the techniques covered in this unit when you are doing real work in SAP

EVENT primary content points: Review of the basic techniques of logging on and off properly. Identification and explanation of the key parts of the SAP main screen.

UNIT title: Getting started with SAP

EVENT Title: Assessment

Estimated Time for EVENT: 10 mins

EVENT – Discussion and Next Steps

EVENT Description: Five knowledge check questions participants answer in their participant guide. Facilitator can conduct the knowledge check as a group exercise if desired.

EVENT Deliverables: Participants able to answer at least four out of five questions correctly without hints.

EVENT-required resources: Facilitator guide, participant guide, computer attached to projector or TV for facilitator, computer workstations for participants, notepads and pens for participants, flipchart, whiteboard, markers

Clarifying Notes on EVENT: Facilitator can optionally conduct the knowledge check as a group exercise, or have participants answer the questions in their booklets. Facilitator should be prepared to demo any answers that are confusing, especially if multiple participants don't get the correct answer.

This would be a good time to elicit the mnemonic "CUPL" to get participants to remember what info they need to log on.

After the assessment, ask participants to comment on any part of the unit they found confusing, intriguing and want to know more, or curious as to how they will use the info in a real use scenario.

EVENT primary and sub-learning objectives:
- Answer at least four of five knowledge check questions correctly

EVENT primary content points: The assessment is not a gateway to SAP access; it's just a quick knowledge check on what they've learned so far.